



## OFFICE OF THE ILLINOIS STATE TREASURER MICHAEL W. FRERICHs

### JOB OPPORTUNITY ANNOUNCEMENT

**Job Title:** Manager of College Savings  
**Division:** College Savings  
**Location:** Chicago, Illinois  
**Salary:** Commensurate with experience  
**Work Hours:** 8:30 A.M. – 5:00 P.M.

**Overview:** The Manager is responsible for ensuring the Illinois 529 College Saving Plans (Bright Start and Bright Directions) are managed, marketed, and administered successfully. This includes, but is not limited to, creating and executing strategy to grow the number of program participants and assets under management, developing and implementing program marketing strategies, analyzing investment performance, addressing issues with account holders, and various other duties, as assigned. Attendance is an essential function of this position.

#### Duties and Responsibilities:

- Collaborates with the Director of College Savings Programs to develop and execute program growth, governance, and due-diligence strategies, as well as larger programmatic management strategies.
- Assists the Director of College Savings Programs in day-to-day management of the programs.
- Oversees College Savings Division compliance issues, monitoring program investment activities to assure compliance with applicable rules and regulations, including contractual, regulatory and statutory requirements.
- Prepares and follows up on any investment changes including approvals, disclosures, and changes in Investment Policy Statement (IPS).
- Coordinates with Director of College Savings to ensure Program Disclosure Statements, marketing materials, and Plan communication meet regulatory and Office of State Treasurer (STO) requirements.
- Ensures compliance of internal procedures, including sensitive information requests, storage, and elimination of records.
- Coordinates with Legislative Affairs to track and support 529 legislation.
- Coordinates with Policy and Programs division to identify new initiative opportunities.
- Research, plan and recommend policy and programmatic initiatives.

#### Specific Skills:

- Exemplary written and oral communication skills and excellent organizational skills,
- Strong Excel skills and the ability to draw broad conclusions from detailed analyses,
- Thorough understanding of Bright Start, Bright Directions and 529 college savings plans,
- Thorough understanding of SEC, MSRB and FINRA regulations and their applicability to 529 Plans.
- Ability to address large groups of people in discussing the Illinois College Savings Program.
- Bilingual (Spanish/English) is a plus.

**Education and Work Experience:** Bachelor's degree in business administration, finance, marketing or any related field; two (2) or more years of experience in an analytical or project management role, OR any equivalent combination of education and experience that provides the required knowledge, skills and abilities to carry out the duties of the position.

**Application Process:** Send completed application including letter of interest and resume via email to:

**Director of Human Resources & Equal Employment Opportunity @ [HR@illinoistreasurer.gov](mailto:HR@illinoistreasurer.gov)**  
[http://www.illinoistreasurer.gov/Office\\_of\\_the\\_Treasurer/Employment\\_Opportunities](http://www.illinoistreasurer.gov/Office_of_the_Treasurer/Employment_Opportunities)

Equal Employment Opportunity Employer. Applicants must be lawfully authorized to work in the United States

State Capitol  
Room 219  
Springfield, IL 62706  
Phone: (217) 782-2211  
Fax: (217) 785-2777  
TTY: (866) 877-6013

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100 West Randolph Street  
Suite 15-600  
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Phone: (312) 814-1700  
Fax: (312) 814-5930  
TTY: (866) 877-6013

Illinois Business Center  
400 West Monroe Street  
Suite 401  
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Fax: (217) 524-3822  
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Myers Building  
One West Old State Capitol Plaza  
Suite 400  
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